



Iowa Retirement Investors' Club (RIC)
457/401a Plans
Look forward to retirement!

Akron Care Center RIC Account Form



Personal Information

Name _____ Social Security # _____
Last First MI Existing accounts use last 4 digits only

Address _____ City _____ State _____ Zip _____

Birth Date _____ Phone (work) _____ Phone (home) _____

457 Payroll Deduction Election

Changes affect the 1st available check of the month following receipt of this form unless a later date is indicated. Stop requests are immediate.

The combined amount of all 457 pretax and Roth contributions in a tax year is limited to the IRS annually declared maximum contribution limits (see <https://das.iowa.gov/RIC/PSE/contributions>).

Deduction amount

MassMutual

Pretax \$ _____

Roth \$ _____

☐ Stop deductions

Future effective date (if desired)

☐ Begin as of _____

Participant Signature

I authorize my employer to process these requests. I have access and agree to the terms and conditions of the Iowa Retirement Investors' Club (RIC) as disclosed in the Plan Document. I have established 457 and 401a accounts with a RIC provider. I understand that the total of all 457 contributions made in the calendar year must not exceed the federal limits as required by the Internal Revenue Code section 457. I understand that withdrawals may only be made upon termination of employment or qualification for an in-service distribution.

X _____

Participant Signature

Date

Form Submission

New accounts:

Provider account forms: Forward to the provider

RIC Account Form: Forward to your payroll office (shown below)

Existing account changes:

RIC Account Form: Forward to your payroll office (shown below)

Agent Use Only

I am authorized to open accounts for this employee and verify that the participant has established 457/401a accounts with the provider shown below.

Print Agent Name

Agent Signature

Agent Phone Number

Provider Name

Date

Received by RIC

Payroll Office

RIC Use Only

Date Received: _____

Paycheck Effective Date: _____

Name: _____

Date Pended: _____

Entered: _____

Checked: _____



Visit the RIC website at <https://das.iowa.gov/RIC> and click on the Public Employees portal to access the RIC At-A-Glance (from Your Plan Details), IRS maximum contribution limits, and other plan options specific to your employer's 457/401a plans.

Akron Care Center

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